What’s New in SAS® Customer Intelligence 360

Release 19.03

This release of SAS Customer Intelligence 360 includes the following new features and enhancements.

Announcing SAS 360 Engage: Direct

SAS 360 Engage: Direct is a new offering designed for direct marketing channels. With this new offering, you can query your on-premises data mart to create focused segments for outbound channels and activity maps. You can also associate key marketing messages with each on-premises segment to create targeted lists for fulfillment. When you pair SAS 360 Engage: Direct with SAS 360 Engage: Digital, you can also use your on-premises segments for digital targeting, ensuring that every marketing activity targets the right customer. For example, with SAS 360 Engage: Direct and SAS 360 Engage: Digital, you can create a web task that uses an on-premises segment to define the target audience.

New Asset Viewer Role

Users with the SAS Administrator role in SAS App Central can now add users to a new Asset Viewer role from the User Roles page. This is a read-only role that enables users to view assets without giving those users the rights to change the assets. Users with this role can download renditions such as the original or preview file, view standard and custom properties of an asset, and share assets. Users with the Asset Viewer role cannot edit, delete, copy, or move assets.

(Available in SAS 360 Plan)

Consistent Size of Asset Thumbnails

Now, when you use the tile view for the Assets page, the asset thumbnails are all the same size. This consistency makes it easier to browse asset lists to find the desired assets.

Enhanced Asset Sharing Options

The asset sharing dialog box enables you to access internal and external (if enabled) links for one or more assets. The internal links are displayed when you select the **Anyone with the link and authorized access** option. The external links are displayed when you select the **Anyone with the link** option.

If external sharing is not enabled for any of the selected assets, a message is displayed, which states that the link is not available. In the Share dialog box, you can now copy and paste all available links to your clipboard for sharing access to the selected assets.


Table-Driven Values for Picklist Custom Properties

When admin users define custom properties in the Microsoft Excel template, they can use single-select and multi-select picklist custom properties to control how these properties are presented to a user of SAS Customer Intelligence 360.

You can now define picklists by one of these methods:

- a named picklist in the Picklists worksheet (an existing feature)
- a column in a table spreadsheet

The new table feature enables you to cascade or filter values by referencing a table worksheet in the Excel file. Support for tables makes it easier to export values from an external system and paste them into Excel for use in SAS Customer Intelligence 360.

For example, you might have location data in another system with entries for cities that includes columns for country, state, and ZIP code. You can export the values from the external system and paste them in a tables tab in the Excel spreadsheet for custom properties. Then, when you define a single-select or multi-select picklist for this location property, you can reference this table to automatically filter values for the user based on the table entries.

This feature is currently available for custom properties that are associated with tasks, messages, and creatives.


Dependent Parent/Child Custom Properties

You can configure custom properties with a parent/child relationship for the custom property values. This feature enables you to configure dependencies between parents and children to simplify how users select values. This feature can also reduce the likelihood of data entry errors.

For example, assume you have three custom properties in a group—country, state, and city:

- The values for “state” should depend on the values selected for “country”. Only states in the selected (parent) country should be displayed.
- The values for “city” should depend on the values selected for “state”. Only cities that are in the selected (parent) state should be displayed.

These parent/child dependencies are configured on a **Dependencies** tab in the custom properties’ Excel spreadsheet.

This feature is currently available for custom properties that are associated with tasks, messages, and creatives.

**New External System Task and Text Creative**

The external system task is a new task type that enables you to use an agent to send creatives to an external system. Although the external system task performs similarly to web and mobile spot tasks, it sends a creative to an agent associated with the task instead of to a spot. The external system task can deliver creatives to channels and external systems that are not directly supported by SAS 360 Engage.

For example, an external system task can be associated with an agent that is connected to a call center system. The task is also configured to be triggered by an event, such as a page view event. When the page view event is triggered by a customer, the task sends the creative to the agent. The agent can then pass the creative to the call center system where it can be presented to the customer.

In association with the external system task, a new creative type called Text is now available. A text creative is a creative that contains only unformatted text. When used with external tasks, a text creative enables you to send textual information such as a message to a customer and to external systems that might accept only unformatted text.

This initial release of the external system task lacks the capability to track goals and use the task in an activity. Also, the text creative cannot be used with other types of tasks. These capabilities are planned for future releases.


**Easy Access to Email Preview with Three Different Widths**

The email preview feature that shows email content across three widths is now easily accessible from the Layout Manager. Simply click the **Responsive Previews** button to see how the layout appears across three widths: desktop, tablet, and mobile. This feature saves several steps that were previously required to preview static emails.

This feature is also available from the **Review** tab.

*Figure 1  Responsive Previews Button*
Capture List-Unsubscribe Events Submitted by Customers

You can now capture list-unsubscribe events submitted by customers when the email recipient uses the "unsubscribe" button in email clients such as Gmail.

This feature supports capturing and honoring the list-unsubscribe requests that are sent to SparkPost. This request comes from recipients who no longer want to receive marketing emails. The recipient can click the 'Unsubscribe from mailing list' link presented by providers such as Gmail.

This feature is not a replacement for traditional unsubscribe links in the body of email messages, which continues to be a part of email content.

Use Shared IP Pools When Sending Email

Currently, each tenant in SAS Customer Intelligence 360 is allocated one or more dedicated IP pools to send email. These pools are defined during setup of the account and are allocated on a tenant-by-tenant basis. No two tenants can share an IP pool.

With this new feature it is possible for tenants to access an IP pool that is made available for all tenants to use and share. This new feature also provides the following benefits:

- Partner enablement: SAS offers shared IP pools that can be used across multiple partners. The tenants of the partner organization use a shared pool and are constrained, by terms of agreement, to the volume of email messages that are sent.

- Faster go-live for customers: This benefit enables users of SAS Customer Intelligence 360 to go live sooner, based on their agreement to be good senders and take precautions to avoid spam. By agreeing to use a shared IP pool, they can take advantage of a setup that is already primed to send large-volume emails.

The choice to use a shared IP pool is made by selecting a binding ID in a send agent. Standard account configurations are necessary by operations and Global Customer Success to use email in SAS Customer Intelligence 360 (for example, DKIM and SPF configuration), but no further setup is necessary to use the shared IP pools (other than selecting the correct binding ID in the send agent). Global Customer Success advises you on which binding ID to use.

(Available in SAS 360 Engage: Email)
Access to Features Matches Product Licenses

You have the option to license these 360 products:

- SAS 360 Discover
- SAS 360 Plan
- SAS 360 Engage: Digital
- SAS 360 Engage: Direct
- SAS 360 Engage: Email
- SAS 360 Engage: Email Testing

Access to specific features and functionality is based on the products you license, affecting access in these areas:

- Assigning user roles: The roles available for assignment match the roles associated with the specific products that you license. This access helps the administrator assign appropriate roles for each user.

- Visibility of features in the user interface: Only the features related to the SAS 360 products that you license are visible in the user interface.

Displaying only the features and functionality that are applicable to the products that you license provides a more streamlined user interface by removing unnecessary elements.


New 360 Plan Roles

Administrative users can now assign users new Planning roles via the User Roles interface by selecting Configuration ➔ General Settings from the navigation bar. With the new 360 Plan roles, users have more flexibility to view 360 Plan information, but users with this role are prevented from changing information.

Users who have these roles can create, edit, and delete comments on plan items.

- Users with the Plan Viewer role can view all areas of 360 Plan.
- Plan Financials and Planning Viewer roles are renamed to Plan Financials Viewer. With this role, users can view planning items and financial information for the planning items.
- Users with the Planning Viewer role can view planning items without the ability to view financial information.

(Available in SAS 360 Plan)

Add Cost Centers to Invoices and Commitments

From Plans ➔ Financials, you can add cost centers directly from a commitment or invoice. You can keep track of cost centers that are used with the planning item and the associated commitments and invoices. When you want to add a cost center, you begin with a list of already selected cost centers as the first step. A cost center that is not previously associated with the planning item can be easily added with a click action.

When you add a cost center to a commitment that is not previously used for the planning item, associated commitments, or invoices, the cost center is automatically added to the planning item. This enhancement helps you keep your cost center distributions in sync. 360 Plan keeps track of the assigned amounts and expenses, ensuring that you always know the current values.

(Available in SAS 360 Plan)
Archive

Release 19.01

This release of SAS Customer Intelligence 360 includes the following new features and enhancements.

Enter Codes Manually

A Code field is now available on the Properties tab for the following objects in SAS Customer Intelligence 360: Segment Maps, Activities, Creatives, Messages, and Tasks. You can manually enter a code in this field. This code might be used to identify an object for auditing or reporting.

(Available in CI 360 Engage)

Include Short URLs in Plain-Text Email Content

When you create content for a plain-text email, you can shorten all the URLs, including the Call-to-Action URLs. This allows plain-text emails with long URLs with customer domains to be tracked. To do this, your marketing organization must create a CNAME in the DNS to route traffic from links that are specified in the organization’s domain to the domain of the tracking service for SAS Customer Intelligence 360.

For example, SampleOrganization uses the s.link.sampleorganization.com domain, but the production tracking tier for SAS Customer Intelligence 360 is tracking-euw.ci360.sas.com. A CNAME needs to be created in the DNS that is similar to this example: s.link.sampleorganization.com CNAME tracking-euw.ci360.sas.com.

The system automatically shortens your long URLs and uses the domain name of your organization. As a result, recipients of the email know who the message is from.

(Available in SAS 360 Engage)

Send HTML and Text Emails in the Same Communication

You can now send multi-purpose email messages (in MIME format) from a single task. The email can contain both HTML and plain-text versions of your messages. Your recipients can read the content regardless of the type of client or device that they might be using.

The user interface for creating email content now provides an option to create the plain-text version of email in the same email task.
Adjust the Horizontal Width of a Multi-Column Block

In this release, you can set the horizontal width for a multi-column block so that it occupies almost the full width of 600 pixels. You can now set a single property to add space to both the left and right sides of a multi-column.

Note: After testing with several clients, the minimum horizontal spacing is restricted to 6 pixels on both sides. This is to prevent content from being distorted in some email clients such as Microsoft Outlook.
Add an Opt-Out Notice and Link to Plain-Text Emails by Default

Plain-text emails carry the same legal obligations that HTML marketing email messages carry. The recipient of the email should be given the opportunity to opt out of receiving further emails and this should be as simple as possible to do.

In this release, a default opt-out notice is now added to the content of new emails to ensure that you remember to enable your customers to opt out of emails. You can remove this notice or modify it as desired.

The standard default notice includes a merge tag. The merge tag is used to insert the recipient email address so that you can confirm who the message was sent to. In addition, there is a merge tag for the opt-out link that your customers can use to request that no further messages are sent.

**Figure 5 Default Opt-Out Notice**

You are currently subscribed as %email_contact%. If you do not wish to receive any further emails, use this link:

```plaintext
%SYSTEM.EMAILMSG.optout_url%
```

(Available in SAS 360 Engage)

Specify an External Image for In-App Message and Push Notification Creatives

Using a URL, you can now reference an external, publicly available image when specifying an image for in-app messages and push notifications that use image-based creatives.

When you add an image to the creative, a window is displayed that enables you to either select an image from the asset repository or provide an image URL. The URL must reference a publicly available image for the creative to render correctly.

Note: The supported file formats for images that you can include in in-app messages and push notifications are .jpeg, .jpg, and .png.

(Available in SAS 360 Engage)

Key Metric Tiles for Mobile Push Notifications and Email

By viewing the Key Metric tiles available on the home page for SAS Customer Intelligence 360, you can see the performance of key metrics to know whether your marketing activities are performing as expected. For example, you can see the top mobile push notification tasks by sent or opened metrics. You could also identify the email tasks with the most attempts, hard bounces, opens, or clicks.

(Available in SAS 360 Engage)

Release 18.12

This release of SAS Customer Intelligence 360 includes the following new features and enhancements.

Create Spots, Messages, and Creatives Directly from Tasks

(Available in SAS 360 Engage)

When you create or edit a task, you might need a new spot, message, or creative to use in that task. Now you can save time by creating spots, messages, and creatives from a task. As a result, you no longer need to navigate away from a task to create the spot, message, or creative.
View the Total Number of Email Previews and Spam Tests Run by Users in Your Organization

You can now run email previews and spam tests as an optional paid-for service. You can run 100 tests each year at no additional cost. After exceeding the 100-test limit, a fee is required for every additional test.

The total number of tests that are run by all users within the organization is displayed on the Review tab of an email task so that you can track how many tests have been executed. You can also view the split count to see how many email previews or spam tests were run. It is recommended that you adopt some best practices about how to reuse the tests and get the most out of this capability. If required, an administrator can hide this functionality to prevent unwanted usage by non-authorized users.

**Figure 6  Preview Email and Spam Test Count**

![Preview Email and Spam Test Count](image)

**Figure 7  Preview Email Details**

![Preview Email Details](image)

**Figure 8  Spam Test Details**

![Spam Test Details](image)
Download Sample Email Templates
You can now get a bundled ZIP file that contains sample email templates. These templates can be imported into the system as assets. Use the email templates to make email content creation easier and more efficient.

Filter User Roles by License
(Available in SAS 360 Discover, SAS 360 Engage, and SAS 360 Plan)
As an administrator, you can assign roles to users to control user access rights. When you edit roles for users, the list of available roles is now filtered based on your license. Filtering the list of available roles based on your license simplifies user management and ensures that you select only the roles that apply to the SAS solutions that you use.

For example, if you have a license for only SAS 360 Discover, you can select only the roles that are associated with SAS 360 Discover. Similarly, if you have licenses for SAS 360 Engage and SAS 360 Plan, you can select roles that are associated with either SAS 360 Engage or SAS 360 Plan.

Associate Standard Events from SAS 360 Engage with an External Agent
The following event types from SAS 360 Engage can now be associated with an external agent:

- identity
- impression
- impression viewable
- email events: send, open, click, opt-out, hard bounce, complaint, and view
- mobile inApp events: send, open, button1click, button2click, and button3click
- mobile push notification tasks: send, click, and discard
- new user session
- conversion
- response
- spot clicked
- click through
- milestones

As a result, a wider range of events can be sent to external systems via an agent. This capability can provide a richer context when analyzing customer behavior or triggering processes in external systems.

Add Title Text and Images to Push Notification Creatives
You can now publish more engaging push notifications by including title text and images in your creatives.
For example, a retailer might want to invite customers to open their mobile app and sign up for a special in-store event, such as a beauty workshop. With an eye-catching title, notification text, and an image, the creative could look something like this:
Notice that two views are displayed: initial (unopened) and expanded (opened). These views enable a user to visualize how the message might appear, based on how the user interacts with the push notification creative on a mobile device.

Note: Your push notification creative can be rendered in different ways depending on the mobile device and the mobile operating system. Test your creatives on several devices to ensure that the notification is rendered how you want.

**Configure Company Holidays**

(Available in SAS 360 Plan)

As an administrator, you can now configure company holidays for each year. These holidays can be displayed on calendars and be excluded from workflow timelines. Configuring company holidays provides visibility for planning and workflow users so that they can plan schedules accordingly.

For example, if you configure a holiday for January 1, this date cannot be selected as a due date in a workflow task. In addition, the date is not counted as a working day in timeline calculations for workflow end dates.

You can configure company holidays in the **Calendars** section, which is accessed from the **Settings** menu in **Plans**.
Modify Active Workflow Tasks
(Available in SAS 360 Plan)

As a workflow manager, you might need to modify workflow tasks after they have been initiated. For example, you might need to modify due dates, add or modify instructions, or cancel an assigned contributor. You can now make such modifications to active workflow tasks from the Workflow Tasks tab in a workflow.

Any modifications that affect dates (such as modifying due dates or canceling contributors) are automatically reflected in all workflow timeline calculations. In addition, the system sends notifications to affected contributors. For example, if you adjust the due dates for a workflow task contributor, the system automatically sends a notification to the affected contributor.

User-friendly Item Identifier
(Available in SAS 360 Plan)

Each planning item, commitment, or invoice includes a customizable unique identifier that enables you to easily reference the item. IDs are unique for the type of item you are creating: planning item, commitment, or invoice. Item IDs can include numbers, characters, and symbols.

Note: Item uniqueness is checked based on this ID, so an item’s name no longer must be unique.

When you migrate existing items or create planning tasks or activities through SAS 360 Engage, the system creates the unique system ID. This system ID is editable. You can also import this ID through the Plan API or by using the import feature with a Microsoft Excel spreadsheet.

Figure 11  User-friendly Item ID

Keep Track of Spending
(Available in SAS 360 Plan)

The Expenses Overview section gives you a better understanding of how much money you have spent for a planning item, the amount that is still promised to vendors, and the amount that is already paid. In addition, this section enables you to review the following items:

- the open commitment amount, which is the amount that you have promised minus any paid invoices
- a sum of all invoices, which includes direct invoice amounts for the planning item and invoice amounts that are associated with the commitment
- expense totals, which are the outstanding commitments plus any invoices, so you know how much money is still available to invest in each planning item

**Figure 12  Expenses Overview**

<table>
<thead>
<tr>
<th>Currency: INR</th>
<th>Expenses Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>₹0,00,000.00</td>
<td>Plan</td>
</tr>
<tr>
<td>₹1,59,000.00</td>
<td>Expenses</td>
</tr>
<tr>
<td>₹5,00,000.00</td>
<td>Outstanding Commitments</td>
</tr>
<tr>
<td>₹9,00,000.00</td>
<td>Invoices</td>
</tr>
<tr>
<td>₹41,00,000.00</td>
<td>Available to spend</td>
</tr>
</tbody>
</table>

**Quick Facts for Media Consumption**
(Available in SAS 360 Discover)

The Media Consumption report delivers insightful details about the various media that are promoted within the site domain or domains. Media consumption mainly focuses on viewable content within the site architecture. You can now see the most pertinent facts about this report from the quick facts page.

**Release 18.11**

**Access Link to Associated Workflow**
(Available in SAS 360 Plan)

You can now catalog files directly from a workflow to assets from the *File Catalog* tab. For assets that are created from workflows, you can access the associated workflow link from an asset. The workflow link is on the *Summary* tab in the asset details. You can view the history of the asset within the workflow, including creation, review, and approval.

**Specify Additional Attributes when Adding Image Assets to HTML Creatives**
(Available in SAS 360 Engage)

When you add images to HTML creatives, you can now browse and select assets in addition to providing a URL for the image. After selecting an asset, you can define other attributes such as alternative text and the call-to-action link. You can specify these attributes without entering the text directly in the HTML editor.
Add View-on-Web Text with a Hyperlink

(Available in SAS 360 Engage)

You can now add View-on-Web Text from the Layout Gallery to the email content by using a drag-and-drop operation. View-on-Web Text contains default text and a merge tag that automatically inserts a hyperlink in the email message. Clicking the hyperlink enables recipients to view the email content in their browser. In earlier releases, you had to complete several manual steps to add a view-on-web link.

When you add View-on-Web Text from the Layout Gallery, you can use all the editing and formatting capabilities that are available for a text block. Email recipients can see the View-on-Web Text when the message is viewed in the email client, not in the browser.

Figure 13  View-on-Web Text

Add a Background Color to the Email Content

(Available in SAS 360 Engage)

You can now add a background color to your entire email message. You can choose a background color to reflect a brand identity, or to reflect seasonal and festive themes. This feature enables you to use the color picker control and select from a standard color palette. Alternatively, you can specify a custom color by using numeric RGB values or Hexadecimal values.
Enhanced Email Preview and Spam Test

(Available in SAS 360 Engage)

You can now preview email content on more than 70 email clients and devices, and on several Internet Service Providers (ISPs). The preview can be executed by clicking Run in any email task that has a Designing status. The test results are available typically within 10 minutes, and they show multiple previews including a thumbnail view, a no-image view, and a full-image view.

The spam test enables you to test whether your email content might be marked as spam. Results from the spam check contain spam scores and detailed information that is provided by the spam filters. You can also view historical records of all the previous tests that were run.
New Quick Facts Tab for Internal Searches, Forms, and Business Processes Reports

(Available in SAS 360 Discover)

Key reports now include a **Quick Facts** tab that presents the most pertinent facts about the report.

- The Internal Searches report analyzes the effectiveness of internal searches in locating information. View key information about search volume, search terms, and failed searches.
- The Forms report uses the highest number of completed forms and the highest number of abandoned forms to analyze user interaction with forms. Find key results for completed and abandoned forms.
- The Business Processes report analyzes the success and abandonment rates of multi-step business processes. Understand the processes and steps that are completed and abandoned by users.
Real-time Reporting
(Available in SAS 360 Engage)
Understand how people are reacting to your digital marketing content by monitoring activity as it happens. Monitoring key tasks helps you understand whether users are responding to your email campaign, or whether mobile device users are engaged with your app so that you can change direction as needed. Find these real-time reports from the **Insights** icon on the left navigation bar:
- Real-Time Email Task Performance
- Real-Time Mobile App Performance
- Real-Time Push Notification Task Performance

The Email Task Performance report is also available from Task Insights.

*Figure 18  Mobile Real Time Report*

Greater Flexibility in Generating Impression-related Click Events with JavaScript
(Available in SAS 360 Engage)
Web developers who use their own JavaScript to deliver content to pages might not want to rely on the SAS tag to derive impression and impression viewable events from the defined spot. With enhancements to the JavaScript API, SAS Customer Intelligence 360 now enables you to perform these tasks:
- send an impression (spot change) event when a creative is delivered by SAS Customer Intelligence 360.
- trigger an impression viewable (spot viewable) event when the content is displayed. This action enables you to control how you define when content is viewed and when to send this event.
- send an impression click (spot click) event when a user performs a click-through action on a spot's creative.

For example, you might define a web spot as a “dummy” object in order to set up a web task. When the SAS tag delivers the content to the web page, you can use the JavaScript API (instead of events defined in the user
interface) to trigger the impression-related events in SAS Customer Intelligence 360. If you do not change the spot and use other methods for displaying content (such as a modal window), you can still ensure that the impressions and impression viewable events are counted accurately.

Download PDF Files with Annotations and Comments
(Available in SAS 360 Plan)

Users who have access to a workflow can now download a PDF file with embedded annotations and comments. You have the option to download files with or without annotations. You can also share the annotated file with people who might not have access to SAS Customer Intelligence 360.

Release 18.10

This release of SAS Customer Intelligence 360 includes the following new features and enhancements.

Retrieve Import Failure Records
(Available in SAS 360 Engage)

When you import customer data into SAS Customer Intelligence 360, occasionally some records cannot be processed. The job status in the user interface and REST API show how many records failed. With this release, you can now use the REST API to download a file that contains the records that could not be processed.

When there are failures, the failure file appears as a signed URL at the end of an import request. The URL is in a new section called “failureOutputFiles”. Use this file to review the failed records, make changes as necessary, and reimport them.

Change the Delimiter for Exporting Data
(Available in SAS 360 Engage)

You can now choose a different delimiter to customize how you want entries in your exported data to be separated. To customize the delimiter, set the “delimiter” attribute in your export request’s JSON body.

You can use these delimiters:

- "",
- “	”
- “|”
- “;”

If you do not specify a delimiter, a comma is used as the default.

Import Data Using identity_id
(Available in SAS 360 Engage)

Previously, when importing customer data, you had to use an identity type (such as subject_id, customer_id, login_id) in order to import data. Now, you can use an identity_id value to import data. This is useful for situations like creating behavior segments or analytics scores externally and reimporting them into SAS Customer Intelligence 360.

When you import data with an identity ID, no identity processing takes place. Values are associated with the customer records directly and can be used in targeting and segmentation if the appropriate settings in the descriptor are set to true.
To use an identity ID, create an import descriptor that uses the “customer” type, and set the identityType value on data items to “identity_id”. Then, add additional data items to the descriptor that represent analytic scores or other information.

Support Multi-select Picklist Custom Properties
(Available in SAS 360 Engage, SAS 360 Plan)

You can now define multi-select picklists for custom properties. This feature gives you more flexibility to define custom properties that match your business needs.

When users edit items with multi-select picklists, they can select one or more values for each property. For example, you might want to set up a custom property for fields such as “Product Category” or “Brand”, and enable users to select multiple values for these properties.

To define a field that is a multi-select picklist, specify “multi-select” as the UI type for an attribute. The available values for a multi-select picklist field are defined in the Picklists worksheet, similar to single select lists and drop-down lists. Multi-select picklist properties are supported for attributes that use the following data types: text, integer, and double.

Save Email Content without Closing the Layout Manager
(Available in SAS 360 Engage)

When you design the layout of an email task, you can now save the email layout without closing the Layout Manager. As you progress, you can save the task along with the content and prevent accidental loss of content.

Figure 19  Save Content

![Image](image1.png)

Figure 20  Save Content (Save Option)

![Image](image2.png)

Paste Text without Source Formatting in Layout Manager
(Available in SAS 360 Engage)

Often marketers get their email content from their creative agencies in the form of HTML files or simple .docx files. When you copy from these sources and paste the text in a text block in the Layout Manager, you might not want to retain the source formatting. You can now paste the text without source formatting, which enables you to apply the styles and formatting of the existing email layout.
Define Default Text Properties

(Available in SAS 360 Engage)

You can set default text properties such as font, size, color, styles, and alignment. These properties are then applied to any new text block that is added to the email task. The saved properties are retained for the email task until you update the default settings and save them.

Select Assets from a Third-party CMS

(Available in SAS 360 Engage)

For mobile in-app message creatives, you can select assets from a third-party content management system in addition to the SAS Digital Asset Management internal repository. The content management system must be integrated with SAS Customer Intelligence 360.

Plan Financial Reports

(Available in SAS 360 Plan)

Four new SAS 360 Plan reports help you track your budget and associated expenses, so you always know that you are on track. Keep an eye on your overall performance with Plan Budget Allocations and Plan Expenses provide summarized views. Plan Over Budget and Plan Over Spend focuses on and highlights areas that are not performing as expected.

These new reports are available from the Insights that are available from the navigation bar:

- Plan Budget Allocations displays information about the budget amounts in selected plans.
- Plan Expense displays information about marketing plan expenses.
- Plan Over Budget lists planning items that have allocated an amount that is greater than their budget.
- Plan Over Spent lists planning items whose expenses total more than the budget amount.
Home Page
(Available in SAS 360 Engage)

Key metrics tiles, which highlight top performance results for active tasks, are easier to find with the home page layout. Tiles are displayed for at-a-glance viewing, so that you quickly can find the answers that you need.
Quick Facts for Content, Downloads, Ecommerce, and Promotions Reports
(Available in SAS 360 Discover)
Four more reports get a new Quick Facts tab! This at-a-glance view highlights key performance results to help you understand what is on track or what needs your attention. Key metrics show performance by time and trend, as well as key groupings by highest performing or most popular rankings.

Gantt View for Specific Workflow
(Available in SAS 360 Plan)
As a workflow manager, you might want to access a Gantt view to visualize the timing for each workflow task and contributor within the workflow. You can now access a Gantt view for a specific workflow. Open a workflow and navigate to the Workflow Tasks tab to display a list view or Gantt view of workflow tasks and contributors. The Gantt view enables you to visualize start and end dates for each task and contributor. Move your mouse pointer over the calendar bars to get more information. You can also drill into workflow tasks from the Gantt view by clicking on the calendar bar for a workflow task. You can select monthly, quarterly, yearly, or custom date range views for the calendar view.

Modify Not-yet-initiated Workflow Tasks in Active Workflow
(Available in SAS 360 Plan)
As a workflow manager, you might need to make changes to workflow tasks after a workflow has been initiated. You can now add or remove contributors and modify durations or due dates for workflow tasks that have not yet been initiated. The projected end dates are modified accordingly.

Release 18.09
This release of SAS Customer Intelligence 360 includes the following new features and enhancements.
“Select All” Is Available in the Approved Domains List

You can now use an option to select all approved domains at the same time in order to activate, deactivate, and delete them in bulk. This new feature is available on the Approved Domains list on the General Site Configuration Domains page.

User Assistance to Define a Business Condition Using Merge Tags
(Available in SAS 360 Engage)

You can now use the user interface to define business conditions with merge tags and operators without manually coding them. This feature reduces human error that can be introduced when you define these conditions manually.

Figure 25 Specify Conditions

Interactive Configuration of Agents for SAS Real-Time Decision Manager and SAS Event Stream Processing

Agents used to establish connections with SAS Real-Time Decision Manager and SAS Event Stream Processing can now be configured directly from the user interface in SAS 360 Engage. Previously, you were required to modify local configuration files, which required direct access to the agent and prevented visibility to how the agents were configured.

In the new interface, users with administrator access can specify the URL endpoint to connect to the SAS solution, and specify how events from SAS 360 Engage map to events in SAS Real-Time Decision Manager or windows in SAS Event Stream Processing.

Each agent can be configured independently to allow specific integration with individual SAS solutions. In addition, each agent can be configured with multiple event mappings.

Push Notification Creative Supports Creative-level Distribution
(Available in SAS 360 Engage)

To ensure that your customers have the most relevant content in push notifications, SAS 360 Engage now offers the ability to customize the delivery of creatives based on one of these options:
Frequency
Set percentage of times that a creative is displayed compared with other creatives in this task.

Sequential
Set the order in which the creatives are displayed.

Rule-based
Define delivery of creatives to a subset of this task’s audience by defining different criteria that must be met for each creative.

To use this creative-level distribution model, construct a message with multiple push notification creatives. On the Content tab of the push notification task, select the message and click Select all creatives. Then click to select your distribution option.

To use this creative-level distribution model, construct a message with multiple push notification creatives. On the Content tab of the push notification task, select the message and click Select all creatives. Then click to select your distribution option.

Figure 26  Set Distribution

Quick Facts for Goals and Visits Reports
(Available in SAS 360 Discover)

The Goals and Visits reports provide insight about website performance. The Quick Facts section displays at-a-glance views of performance results. Key metrics show counts by time and trend as well as key groupings by highest performing or most popular rankings.
Figure 27  Goals Report

Goals during past 4 weeks:

160

New/Removals: 160 / 0

Goal Changes with highest GOALS

Goal Areas with highest GOALS

Organizations with highest GOALS

Revenue during past 4 weeks:

51,075,000

New/Removals: 87,626,000 / 0

Graphs show changes in goals and revenue within specific categories.

Reports created on: July 11, 2018 08:59:59 AM
Figure 28  Visits Report
“Approve with comments” Status Is Available for Workflow Task Approvals

(Available in SAS 360 Plan)

When you configure approval tasks in a workflow template, you can now define the following status values: “Approve,” “Reject,” and “Approve with comments.”

The new “Approve with comments” status provides more flexibility when you assign status values to a given workflow approval task. For example, you might have a content approval task with the following outcomes:

Approve
   Approve content as is with no further changes required.

Reject
   Changes need to be made and another approval task might be required after changes are made.

Approve with comments
   Changes should be made to content; no further approval is required.

Release 18.08

This release of SAS Customer Intelligence 360 includes the following new features and enhancements.

Export API for Events

(Available in SAS 360 Engage)

There is a new REST API endpoint that enables you to export event data from SAS 360 Engage based on ad hoc queries on event data.

This API improves the existing API for ad hoc export in these ways:

- Names for data items are now more user friendly and descriptive.
- The export process is more efficient. You can define the export query and submit the request using the same POST call.

After you submit a request, you use a GET request with the request ID to download the event data from a temporary URL. The data can then be used locally in various scenarios for data integration.

Note: The new API limits you to a maximum of 31 days of data for each export request. So, if you want to export all impressions, click-throughs, and conversions for a task that ran for three months, you would have to make three separate queries.

Add a Horizontal Line in the Layout Manager

(Available in SAS 360 Engage)

When you design an email for your marketing campaign, the Layout Manager enables you to add a horizontal line. Drag the horizontal line from the Layout Gallery and place it in your email layout to separate the content.
Simplified Selection of Content Type (HTML or Plain Text)
(Available in SAS 360 Engage)
When you add content to an email task, it is easier to select the format of the email content. You can select the HTML format and use the drag-and-drop editor (or the HTML code editor) to add and edit email content. Alternatively, you can select the plain text format and use a plain text editor.
A pop-up message prompts you to use the selected format consistently for an email task.

Provide a 404 Page If the Email Imprint Is Not Available
(Available in SAS 360 Engage)
You can now customize the page that you want to display when an email recipient clicks a View on Web link in an email and the requested email imprint is not available. This scenario is most likely to occur when an imprint has been deleted automatically after 90 days.

Create Custom Agents
Previously, integration with third-party applications was supported with plug-ins. While this provided integration with the application, the configuration of the agent was limited and could be deployed only as a stand-alone module.

With this release, the agent SDK supports the creation of custom agents. These custom agents ensure secure access to SAS Customer Intelligence 360 in a manner that addresses the specific needs of an organization’s system.
Custom agents support the same capabilities as standard agents to establish a secure WebSocket connection to stream events from SAS Customer Intelligence 360. Custom agents that are developed using the SDK allow customization of the agent behavior. For example, a custom agent can be used to confirm to SAS Customer Intelligence 360 that an event has been received. It also allows the agent capabilities to be integrated into other systems so that the events received from SAS Customer Intelligence 360 can be processed seamlessly.

The agent SDK can be managed in Maven so that it can be incorporated directly in a system's build process.

**Target Specific Device IDs**

*(Available in SAS 360 Engage)*

When you need to send broadcast push notifications to specific mobile devices, the new Bulk Push Notification Task enables you to send a push notification to a targeted list of specific device IDs. This typically applies to situations in which customer identities are not important and you want to target all device types or a curated list of specific device IDs.

To use this feature:

1. Upload your Transient Device ID list.
2. Create a new Push Notification Task, and select as the preferred method of execution.
3. On the Targeting tab, select your Transient Device ID list. This action ensures that the associated creative is published directly to those devices.

**Note:** You can include merge tag data in the Device ID Transient File (as other columns), but other merge tag sources are not fully supported for this use. Also, Task Insights might not be accurate. The system calculates responses based only on unique customer IDs, so responses from bulk pushes are not fully accounted for. Future releases will improve response calculations for notifications that are sent by a device ID.

**Mobile App SDK Version and Release Date**

*(Available in SAS 360 Engage)*

You can now derive the version and the release date of the mobile SDK directly from the SDK, which can improve how you develop code and troubleshoot any technical issues.

The SDK version and the release date correspond to the versions and dates in the Mobile SDK Change Log that are available on support.sas.com.

**Plans Advanced Filter Order**

*(Available in SAS 360 Engage)*

From the list view, you can create a more focused view of information by refining results with the advanced filter. When using this filter in Plans, the **Type** and **Parent Level** planning item types maintain the default marketing hierarchy order so that you can quickly find what you are looking for.
Workflow and Approvals Setting
(Available in SAS 360 Plan)

You can set up your plans to show the workflow and approval features for only marketing levels that you select. When this feature is enabled, you can initiate and step through workflow tasks for some marketing levels without having to access these features in other marketing levels. This configuration is available in General > Plan > Marketing Hierarchies and from the level configuration icon in each planning level.
User Roles
(Available in SAS 360 Discover, SAS 360 Engage, SAS 360 Plan)

As an administrator, you can now create distinct user roles to limit users’ access to only features in SAS Customer Intelligence 360 that are specific to their roles.

Each role is configured to allow read-only or edit access to a set of features. Assign users to one or more roles based on their responsibilities.

Advertising and Campaign Quick Facts
(Available in SAS 360 Discover)

The Advertising and Campaign report provides insight about overall advertising and campaign performance. This report now includes a Quick Facts section that summarizes visitor performance results. Key metrics show visitor and conversion counts by time and trend, search engine popularity and performance, origination performance, and landing page popularity.
Figure 33  Quick Facts Report
Configure Default Instructions for Workflow Task Contributors

(Available in SAS 360 Plan)

As a workflow template administrator, you can now configure default instructions for specific contributors or for all contributors in a multi-contributor workflow task.

To define default instructions, edit a workflow template, navigate to the workflow tasks tab, and click a specific workflow task in the diagram to configure. Define a default contributor, and then click Add to define instructions for that contributor. If it is a multi-contributor workflow task, you define instructions for all contributors in the global instructions area.

When a workflow is created from a template, the default instructions appear automatically. As a workflow manager, you can then edit the default instructions as needed. This feature can save you time and effort when you need to specify instructions that are common across workflow instances.